

***Improving Data Entry  
of  
CD4 Counts***

**March 2012**

teamwork

teamwork

# Welcome!

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- The State Office of AIDS (OA) is continuing to work with providers to improve the quality of data that is collected and entered into ARIES.
- Today's webinar will focus on the CD4 test count fields.

# Objectives

- The Importance of CD4 Count Fields;
- Entering CD4 Test Count Fields;
- Defining the Fields Collected for CD4;
- Collecting CD4 Tips;
- CD4 Batch Data Entry;
- Running the Disease Management Report;
- Running the Fix-It: CD4 Report; and
- Questions and Answers.

# Importance of CD4 Counts

- This field is important for several reasons:
  - It helps providers monitor or assess the severity of their clients' HIV/AIDS disease.
  - It provides critical information for their clients' HIV/AIDS disease management.
  - It assists agencies, fiscal agents and the CA OA in tracking and monitoring the HIV/AIDS epidemic in their respective areas.

# Importance of CD4 Counts (con't)

- This field is also critical because it is required for:
  - All medical providers who receive funding through the OA HIV Care Program (HCP) and the Medi-Cal Waiver Program;
  - HRSA's Ryan White Services Report (RSR);
  - HRSA's Completeness Reports, and
  - HAB's QM Indicator Reports (CD4 is a Group 1 measure).

# Adding CD4 Information

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- We're going to review the steps for adding CD4 counts for an existing client.
- We'll also give tips for collecting accurate information.

# Begin by finding the client record and going to the Medical History Subtab...


< Back Home Find New Reports Shortcuts Help Logout

DEMO DEMO DEMO DEMO DEMO

## Client Search

To find a client, or to check if a client is new to your agency, enter in some or all of the following information. You may use the wildcard \*.

|  |   |             |
|--|---|-------------|
| Last Name  | <input type="text" value="Ashton"/>     |             |
| First Name   | <input type="text" value="Zach"/>       |             |
| Middle Initial   | <input type="text"/>                    |             |
| Client ID  | <input type="text"/>                    |             |
| SSN  | <input type="text"/>                    | 123-45-6789 |
| Date of Birth  | <input type="text"/>                    | mm/dd/yyyy  |
| Display  | <input type="text" value="20"/> results |             |
| <input type="checkbox"/> Search Related/Affected Individuals |   |             |
| <input type="button" value="Search &gt;"/>                   |   |             |



# The Medical History Read-Only screen will display several CD4 fields.

< Back Home Find New Reports Shortcuts Help Logout

DEMO DEMO DEMO DEMO DEMO

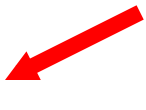
DEMO-GRAPHICS ELIGIBILITY PROGRAMS **MEDICAL** MEDICATIONS RISK & ASSESSMENTS CARE PLAN CASE NOTES SERVICES CUSTOM DATA


BASIC MEDICAL **MEDICAL HISTORY** OB/GYN & PREGNANCY

MEDICAL HISTORY **ARIES**

**Zach A Ashton** ⚠

Medical History **Edit** **Flowsheet**

**Most recent CD4:** 150 as of 5/17/2010 }   
**Lowest CD4:** 150 as of 5/17/2010  
**Most recent Viral Load:** 17,000 as of 2/24/2010, 4.2  
**Highest Viral Load:** 20,014 as of 10/1/2008, 4.3  
**TB Test Medically Indicated:** Unknown  
**TB PPD Skin Test:**  
**MDR:** No  
**IGRA:**  
**Chest X-Ray:**  
**TB Treatment:** (Type: N/A, Status: N/A, Date: 9/8/2008)



| STI/Hep                              | Test Date | Diagnosis   | Lab Value | Tx Ind? | Treat Date | Outcome | Notes |
|--------------------------------------|-----------|-------------|-----------|---------|------------|---------|-------|
| Human papillomavirus (genital warts) | 4/19/2010 | Presumptive |           | Yes     | 4/27/2010  |         |       |



# CD4 Fields on the Medical History Read-Only Screen

| <u>Field</u>    | <u>Definition</u>  |
|-----------------|--|
| Most Recent CD4 | The most current CD4+ T-Cell count including the date of testing and the lymphocyte percentage.    |
| Lowest CD4      | The lowest recorded CD4+ T-Cell count including the date of testing and the lymphocyte percentage. |

# Click *Edit* from the Medical History Read-Only screen.


< Back Home Find New Reports Shortcuts Help Logout

DEMO DEMO DEMO DEMO DEMO

DEMO-GRAPHICS ELIGIBILITY PROGRAMS **MEDICAL** MEDICATIONS RISK & ASSESSMENTS CARE PLAN CASE NOTES SERVICES CUSTOM DATA


BASIC MEDICAL MEDICAL HISTORY OB/GYN & PREGNANCY

MEDICAL HISTORY **ARIES**

**Zach A Ashton** 

Medical History **Edit** Flowsheet

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**MDR:** No  
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**Chest X-Ray:**  
**TB Treatment:** (Type: N/A, Status: N/A, Date: 9/8/2008)

















| STI/Hep                              | Test Date | Diagnosis   | Lab Value | Tx Ind? | Treat Date | Outcome | Notes |
|--------------------------------------|-----------|-------------|-----------|---------|------------|---------|-------|
| Human papillomavirus (genital warts) | 4/19/2010 | Presumptive |           | Yes     | 4/27/2010  |         |       |

# The CD4 fields will be displayed at the top of the screen under *Tests*.


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## Zach A Ashton Medical History


TESTS

| CD4 Date * | T Cell Count * | % |   | Viral Load Date * | < = > | Value * | Test Type | Log |   |
|------------|----------------|---|---|-------------------|-------|---------|-----------|-----|---|
| 5/17/2010  | 150            |   |    | 2/24/2010         | =     | 17,000  |           | 4.2 |  |
| 2/24/2010  | 368            |   |    | 9/21/2009         | =     | 18,100  |           | 4.3 |  |
| 9/21/2009  | 341            |   |    | 10/1/2008         | =     | 20,014  |           | 4.3 |  |
| 4/2/2009   | 300            |   |    | 4/30/2008         | =     | 20,001  |           | 4.3 |  |
| 10/1/2008  | 239            |   |    |                   |       |         |           |     |  |
| 6/8/2008   | 225            |   |   |                   |       |         |           |     |   |
| 4/30/2008  | 226            |   |  |                   |       |         |           |     |   |
|            |                |   |  |                   |       |         |           |     |   |


  

| STI/Hepatitis *                      | Date *    | Diagnosis * | Lab Value | Tx Ind? * | Treatment Start Date * | Treatment End Date | Outcome | Notes   |
|--------------------------------------|-----------|-------------|-----------|-----------|------------------------|--------------------|---------|---|
| Human papillomavirus (genital warts) | 4/19/2010 | Presumptive |           | Yes       | 4/27/2010              |                    |         |  |


# To enter a new CD4 Count, click *New* under the appropriate field.

DEMO DEMO DEMO DEMO DEMO

## Zach A Ashton Medical History

 TESTS

| CD4 Date * | T Cell Count * | % |                      | Viral Load Date * | < = > | Value * | Test Type | Log |                      |
|------------|----------------|---|----------------------|-------------------|-------|---------|-----------|-----|----------------------|
| 5/17/2010  | 150            |   | <a href="#">Edit</a> | 2/24/2010         | =     | 17,000  |           | 4.2 | <a href="#">Edit</a> |
| 2/24/2010  | 368            |   | <a href="#">Edit</a> | 9/21/2009         | =     | 18,100  |           | 4.3 | <a href="#">Edit</a> |
| 9/21/2009  | 341            |   | <a href="#">Edit</a> | 10/1/2008         | =     | 20,014  |           | 4.3 | <a href="#">Edit</a> |
| 4/2/2009   | 300            |   | <a href="#">Edit</a> | 4/30/2008         | =     | 20,001  |           | 4.3 | <a href="#">Edit</a> |
| 10/1/2008  | 239            |   | <a href="#">Edit</a> |                   |       |         |           |     | <a href="#">New</a>  |
| 6/8/2008   | 225            |   | <a href="#">Edit</a> |                   |       |         |           |     |                      |
| 4/30/2008  | 226            |   | <a href="#">Edit</a> |                   |       |         |           |     |                      |
|            |                |   | <a href="#">New</a>  |                   |       |         |           |     |                      |



# To edit an existing CD4 Count, click *Edit* next to the appropriate field.

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DEMO

DEMO

DEMO

## Zach A Ashton Medical History



### TESTS


| CD4 Date * | T Cell Count * | % |                      | Viral Load Date * | < = > | Value * | Test Type | Log |                      |
|------------|----------------|---|----------------------|-------------------|-------|---------|-----------|-----|----------------------|
| 5/17/2010  | 150            |   | <a href="#">Edit</a> | 2/24/2010         | =     | 17,000  |           | 4.2 | <a href="#">Edit</a> |
| 2/24/2010  | 368            |   | <a href="#">Edit</a> | 9/21/2009         | =     | 18,100  |           | 4.3 | <a href="#">Edit</a> |
| 9/21/2009  | 341            |   | <a href="#">Edit</a> | 10/1/2008         | =     | 20,014  |           | 4.3 | <a href="#">Edit</a> |
| 4/2/2009   | 300            |   | <a href="#">Edit</a> | 4/30/2008         | =     | 20,001  |           | 4.3 | <a href="#">Edit</a> |
| 10/1/2008  | 239            |   | <a href="#">Edit</a> |                   |       |         |           |     | <a href="#">New</a>  |
| 6/8/2008   | 225            |   | <a href="#">Edit</a> |                   |       |         |           |     |                      |
| 4/30/2008  | 226            |   | <a href="#">Edit</a> |                   |       |         |           |     |                      |
|            |                |   | <a href="#">New</a>  |                   |       |         |           |     |                      |





When you click on *New* for CD4 count, the *CD4 Date*, *T-Cell Count*, and *T-Cell Percentage* data entry boxes will be displayed.


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### Zach A Ashton Medical History

 TESTS

| CD4 Date * | T Cell Count * | % | Viral Load Date * | < = > | Value * | Test Type | Log |
|------------|----------------|---|-------------------|-------|---------|-----------|-----|
| 5/17/2010  | 150            |   | 2/24/2010         | =     | 17,000  |           | 4.2 |
| 2/24/2010  | 368            |   | 9/21/2009         | =     | 18,100  |           | 4.3 |
| 9/21/2009  | 341            |   | 10/1/2008         | =     | 20,014  |           | 4.3 |
| 4/2/2009   | 300            |   | 4/30/2008         | =     | 20,001  |           | 4.3 |
| 10/1/2008  | 239            |   |                   |       |         |           |     |
| 6/8/2008   | 225            |   |                   |       |         |           |     |
| 4/30/2008  | 226            |   |                   |       |         |           |     |






# CD4 Count: Field Definitions

| <u>CD4 Fields</u>   | <u>Definition</u>  |
|---------------------|--|
| <b>CD4 Date</b>     | Enter the date the CD4 test was administered. Format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon. For each field, use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes. |
| <b>T Cell Count</b> | Enter the client's new T-cell count.   |
| <b>%</b>            | Enter the client's new T-Cell percentage. Do not include the % sign; ARIES will supply this. If you do not know the percentage, leave it blank. Do not enter 0.  |

# Don't forget to click the Save button after you have entered the appropriate CD4 Count Information.


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## Zach A Ashton Medical History

 TESTS

| CD4 Date * | T Cell Count * | % |
|------------|----------------|---|
| 5/17/2010  | 150            |   |
| 2/24/2010  | 368            |   |
| 9/21/2009  | 341            |   |
| 4/2/2009   | 300            |   |
| 10/1/2008  | 239            |   |
| 6/8/2008   | 225            |   |
| 4/30/2008  | 226            |   |

| Viral Load Date * | < = > | Value * | Test Type          | Log |
|-------------------|-------|---------|--------------------|-----|
| 2/5/2011          | =     | 16,000  | Roche PCR Standard | 4.2 |
| 2/24/2010         | =     | 17,000  |                    | 4.2 |
| 9/21/2009         | =     | 18,100  |                    | 4.3 |
| 10/1/2008         | =     | 20,014  |                    | 4.3 |
| 4/30/2008         | =     | 20,001  |                    | 4.3 |






# Click the *Cancel* button if you do not wish to save the information.




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## Zach A Ashton Medical History



 TESTS

| CD4 Date * | T Cell Count * | % |
|------------|----------------|---|
| 5/17/2010  | 150            |   |
| 2/24/2010  | 368            |   |
| 9/21/2009  | 341            |   |
| 4/2/2009   | 300            |   |
| 10/1/2008  | 239            |   |
| 6/8/2008   | 225            |   |
| 4/30/2008  | 226            |   |

| Viral Load Date * | < = > | Value * | Test Type          | Log |
|-------------------|-------|---------|--------------------|-----|
| 2/5/2011          | =     | 16,000  | Roche PCR Standard | 4.2 |
| 2/24/2010         | =     | 17,000  |                    | 4.2 |
| 9/21/2009         | =     | 18,100  |                    | 4.3 |
| 10/1/2008         | =     | 20,014  |                    | 4.3 |
| 4/30/2008         | =     | 20,001  |                    | 4.3 |

  =

# Tips for Collecting CD4 Counts

- Remember, if you are a medical provider, this field is required for the RSR.
- Providers should use lab results or documentation whenever possible rather than relying on the client self-reporting the information.
- If possible, have staff double check the entries.
- If the client is a share client, you will be able to see CD4 counts that other agencies have entered.
- The percent field for CD4 is not required. You can leave it blank. Do not enter 0.

# Lab Batch Data Entry

- The Lab Batch Data Entry tab allows for batch entry of CD4 (and Viral Load) test results in a single location. This saves significant time over the task of retrieving individual clients' records and tabbing to their medical screen to enter data.

# ARIES Lab Batch Data Entry is located in the Agency screen.

The screenshot displays the ARIES web application interface. At the top, a navigation bar includes links for < Back, Home, Find, New, Reports, Shortcuts, Help, and Logout. Below this, a secondary navigation bar contains buttons for DEMO-GRAPHICS, ELIGIBILITY, CONTACT INFO, RISK & ASSESSMENTS, and CARE PLANS. A dropdown menu is open under the 'Shortcuts' link, listing various options: Service Line, Referrals, Eligibility Docs, Financial, Insurance, New Program, Medical (Pregnancy), Case Notes, Needs Assessment, Care Plan, Flowsheet, and My Profile. Two red arrows indicate the navigation path: one from the 'Shortcuts' link to the dropdown menu, and another from the 'My Profile' option in the dropdown to the 'Zach A Ashton' profile section. The profile section includes contact information, phone numbers, residence details, and mailing address.

**1 Click Shortcuts**

**2 Click My Profile**

**Zach A Ashton** ⚠

**Contact Information** [Edit](#)

**Phones:**  
936-864-2875 (Mobile) -- be confidential; no messages  
936-847-3452 (TTY) -- do not contact; be confidential; no messages  
[zashton106@ibm.com](mailto:zashton106@ibm.com) -- be confidential; no messages

**Residence:**  
19883 Sunset Blvd  
#28  
Hollywood, CA 91123  
**County:** Los Angeles  
**Geog Area/HSDA:**

**Previous Address:**

**County:**  
**Geog Area/HSDA:**

**Contact Information:**  
Be confidential  
Note: Contact Dr. Howard Tsai regarding condition

**Mailing Address:**  
19883 Sunset Blvd  
#28  
Hollywood, CA 91123  
**County:** Los Angeles  
**Geog Area/HSDA:**

**Emergency:**

**Phone 1:**  
**Phone 2:**  
be confidential; no messages

# Navigating to the Agency Screen

The screenshot displays a web application interface. At the top, there is a black navigation bar with the following links: < Back, Home, Find, New, Reports, Shortcuts, Help, and Logout. Below this is a yellow banner with the word "DEMO" repeated five times. The main content area is titled "Agency Management" and features a link for "CA Sample Provider Agency" which is highlighted with a red dashed box. A red arrow points from a text box on the left to this link. Below the link, the agency's details are listed: "Primary Site: Main", "1616 Capitol Avenue", and "Sacramento, CA 95814". At the bottom of the agency details, there are two buttons: "Edit" (yellow) and "Change Password" (dark blue). In the bottom left corner, there is a link for "Contact Information".

< Back Home Find New Reports Shortcuts Help Logout

DEMO DEMO DEMO DEMO DEMO

**Agency Management**

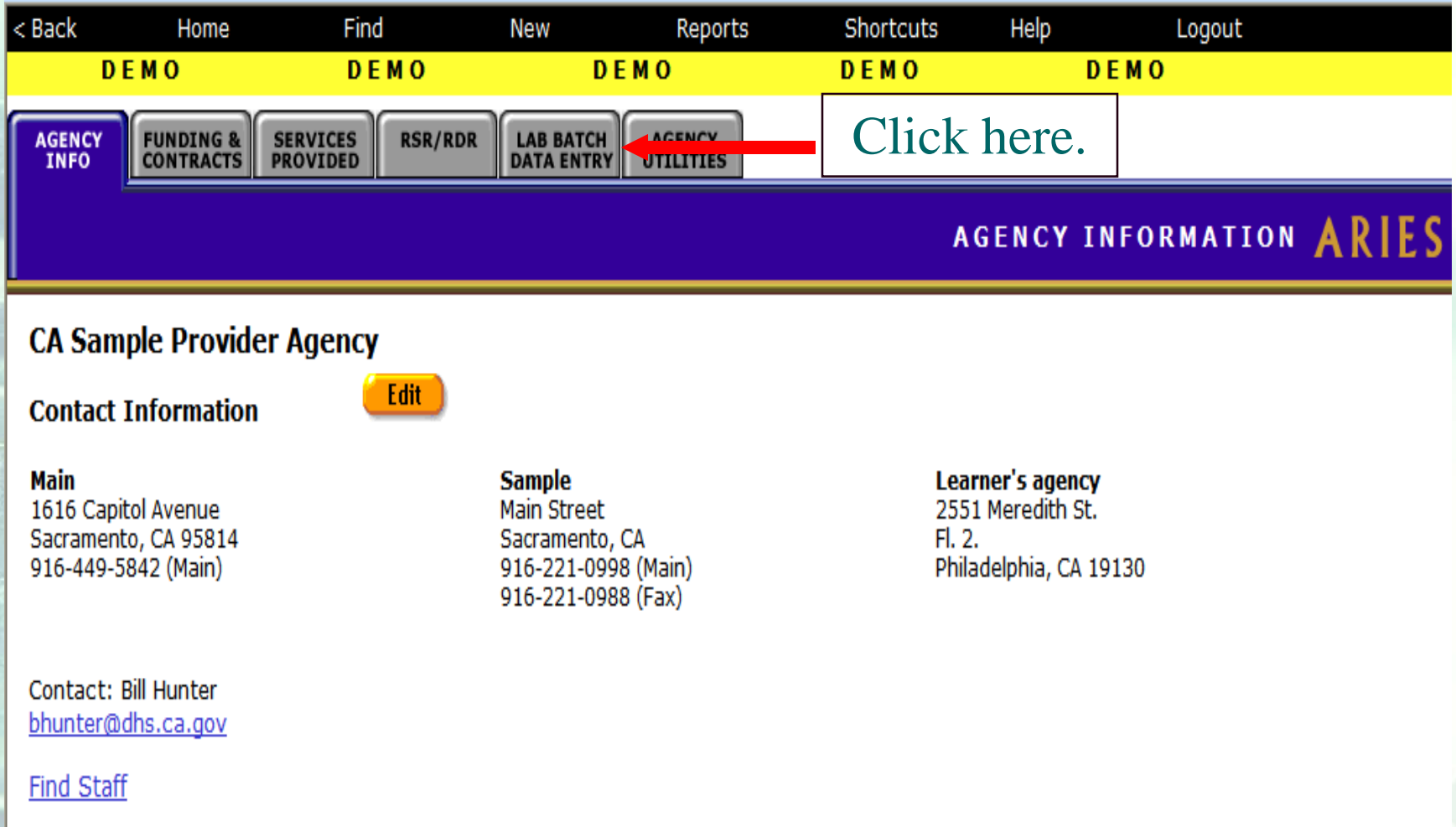
[CA Sample Provider Agency](#)

Primary Site: Main  
1616 Capitol Avenue  
Sacramento, CA 95814

Edit Change Password

[Contact Information](#)

Once your agency name is displayed, you will see the *Lab Batch Data Entry* tab.



The screenshot shows the ARIES web application interface. At the top, there is a navigation bar with links: < Back, Home, Find, New, Reports, Shortcuts, Help, and Logout. Below this is a yellow banner with the word 'DEMO' repeated five times. Underneath the banner is a row of navigation tabs: AGENCY INFO, FUNDING & CONTRACTS, SERVICES PROVIDED, RSR/RDR, LAB BATCH DATA ENTRY, and AGENCY UTILITIES. A red arrow points to the 'LAB BATCH DATA ENTRY' tab, and a white box with a black border and the text 'Click here.' is positioned to its right. Below the tabs is a purple banner with the text 'AGENCY INFORMATION ARIES'. The main content area displays 'CA Sample Provider Agency' with an 'Edit' button. Underneath, there is a 'Contact Information' section with three columns of contact details: Main, Sample, and Learner's agency. At the bottom left, there is a 'Contact: Bill Hunter' section with an email address and a 'Find Staff' link.

< Back Home Find New Reports Shortcuts Help Logout

DEMO DEMO DEMO DEMO DEMO

AGENCY INFO FUNDING & CONTRACTS SERVICES PROVIDED RSR/RDR LAB BATCH DATA ENTRY AGENCY UTILITIES

Click here.

AGENCY INFORMATION ARIES

### CA Sample Provider Agency

[Edit](#)

#### Contact Information

|   |   |  |
|---|---|--|
| <b>Main</b><br>1616 Capitol Avenue<br>Sacramento, CA 95814<br>916-449-5842 (Main) | <b>Sample</b><br>Main Street<br>Sacramento, CA<br>916-221-0998 (Main)<br>916-221-0988 (Fax) | <b>Learner's agency</b><br>2551 Meredith St.<br>Fl. 2.<br>Philadelphia, CA 19130 |
|---|---|--|

Contact: Bill Hunter  
[bhunter@dhs.ca.gov](mailto:bhunter@dhs.ca.gov)

[Find Staff](#)

To enter CD4 Tests, click the *CD4 Tests* link.

< Back      Home      Find      New      Reports

**DEMO**      **DEMO**      **DEMO**

AGENCY INFO    FUNDING & CONTRACTS    SERVICES PROVIDED    RSR/RDR    **LAB BATCH DATA ENTRY**    AGENCY UTILITIES

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**CA Sample Provider Agency**

**Lab Batch Data Entry**

[CD4 Tests](#)    ←

[Viral Load Tests](#)

If you click on the CD4, many of the same fields are displayed as on the *Medical History* tab.

< Back Home Find New Reports Shortcuts Help

DEMO DEMO DEMO DEMO DEMO

AGENCY INFO FUNDING & CONTRACTS SERVICES PROVIDED RSR/RDR LAB BATCH DATA ENTRY AGENCY UTILITIES

LAB BATCH DATA

CA Sample Provider Agency  
Batch Entry of CD4 Tests

Agency Client ID ▼ CD4 Date \* T Cell Count \* % Validation

|                      |                      |                      |                      |  |
|----------------------|----------------------|----------------------|----------------------|--|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |  |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |  |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |  |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |  |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |  |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |  |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |  |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |  |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |  |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |  |



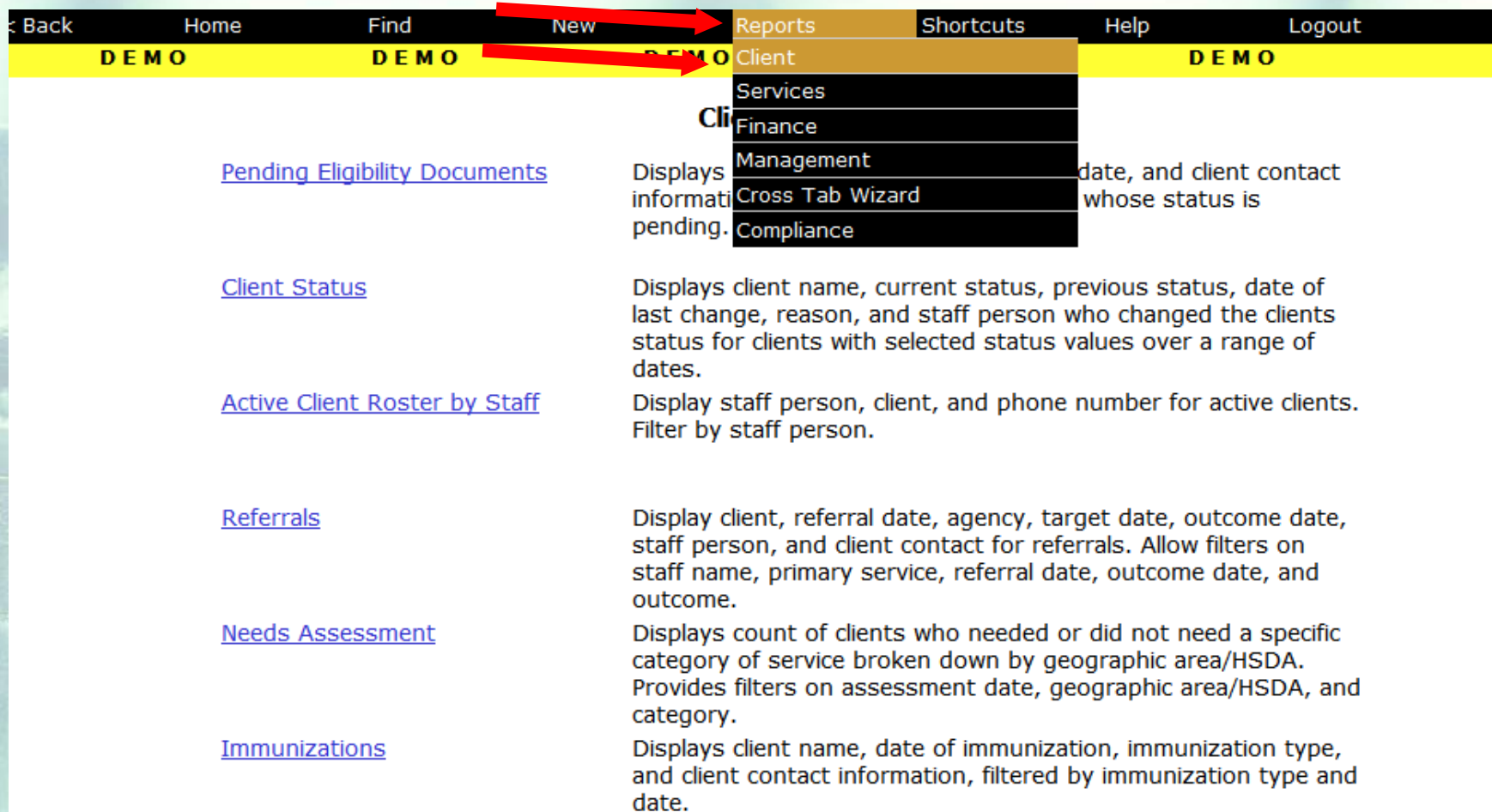
# Two new fields are displayed for CD4 in Lab Batch Data Entry

| <u>CD4 Fields</u>           | <u>Definition</u>   |
|-----------------------------|---|
| <b>Identifier Drop-Down</b> | Select the identifier to be associated with the data entered: Agency Client ID, Agency Program ID, or Extended URN.   |
| <b>Validation</b>           | <p>If your entry included errors, they will be displayed in red in the Validation column once you click the <i>Save</i> button. If you have made an error, you can correct them in the appropriate field and click <i>Save</i> again.</p> <p>Examples:</p> <ol style="list-style-type: none"><li>1. No client found with provided AgencyClientID; or</li><li>2. Multiple clients found with AgencyClientID provided</li></ol> |

# Disease Management Report

- The Disease Management Report allows providers to compare clients' CD4 (and VL) test results over two time periods.
- This can give a broad view of your clients' progress at your agency.
- You can report on CD4 lymphocyte testing (and Viral Load testing) by entering initial and final testing dates. The report will include all clients who received testing within those two time spans. For example, you can compare the CD4s of clients from two different years.


To locate the *Disease Management* report, go to *Reports* and select the *Client* menu.



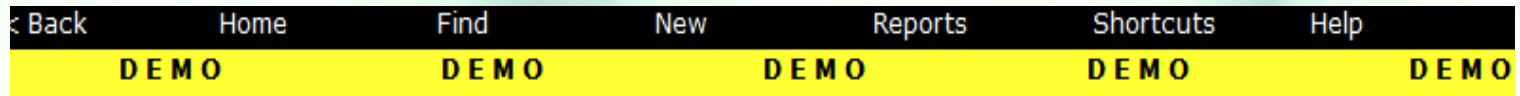
The screenshot shows a web application interface with a navigation bar at the top. The navigation bar includes links for Back, Home, Find, New, Reports, Shortcuts, Help, and Logout. The 'New' link is highlighted with a red arrow pointing to the 'Reports' menu. The 'Reports' menu is open, showing a list of options: Client, Services, Finance, Management, Cross Tab Wizard, and Compliance. The 'Client' option is highlighted with a red arrow. Below the navigation bar, there is a list of reports with their descriptions:

| Report Name                                   | Description   |
|---|---|
| <a href="#">Pending Eligibility Documents</a> | Displays information on clients whose status is pending.  |
| <a href="#">Client Status</a>                 | Displays client name, current status, previous status, date of last change, reason, and staff person who changed the clients status for clients with selected status values over a range of dates.        |
| <a href="#">Active Client Roster by Staff</a> | Display staff person, client, and phone number for active clients. Filter by staff person.  |
| <a href="#">Referrals</a>                     | Display client, referral date, agency, target date, outcome date, staff person, and client contact for referrals. Allow filters on staff name, primary service, referral date, outcome date, and outcome. |
| <a href="#">Needs Assessment</a>              | Displays count of clients who needed or did not need a specific category of service broken down by geographic area/HSDA. Provides filters on assessment date, geographic area/HSDA, and category.         |
| <a href="#">Immunizations</a>                 | Displays client name, date of immunization, immunization type, and client contact information, filtered by immunization type and date.  |

# To display the report, click the *Disease Management* link.

| <a href="#">Back</a>   | <a href="#">Home</a>  | <a href="#">Find</a> | <a href="#">New</a> | <a href="#">Reports</a> | <a href="#">Shortcuts</a> | <a href="#">Help</a> | <a href="#">Logout</a> |
|--|---|----------------------|---------------------|-------------------------|---------------------------|----------------------|------------------------|
| DEMO   | DEMO  | DEMO                 | DEMO                | DEMO                    | DEMO                      | DEMO                 | DEMO                   |
| <b>Client Reports</b>  |   |                      |                     |                         |                           |                      |                        |
| <a href="#">Pending Eligibility Documents</a>  | Displays client, staff, document, intake date, and client contact information for each eligibility document whose status is pending. Filter by intake date.   |                      |                     |                         |                           |                      |                        |
| <a href="#">Client Status</a>  | Displays client name, current status, previous status, date of last change, reason, and staff person who changed the clients status for clients with selected status values over a range of dates.        |                      |                     |                         |                           |                      |                        |
| <a href="#">Active Client Roster by Staff</a>  | Display staff person, client, and phone number for active clients. Filter by staff person.  |                      |                     |                         |                           |                      |                        |
| <a href="#">Referrals</a>  | Display client, referral date, agency, target date, outcome date, staff person, and client contact for referrals. Allow filters on staff name, primary service, referral date, outcome date, and outcome. |                      |                     |                         |                           |                      |                        |
| <a href="#">Needs Assessment</a>   | Displays count of clients who needed or did not need a specific category of service broken down by geographic area/HSDA. Provides filters on assessment date, geographic area/HSDA, and category.         |                      |                     |                         |                           |                      |                        |
| <a href="#">Immunizations</a>  | Displays client name, date of immunization, immunization type, and client contact information, filtered by immunization type and date.  |                      |                     |                         |                           |                      |                        |
|  <a href="#">Disease Management</a> | Displays change in client CD4 and viral load over a range of two dates.   |                      |                     |                         |                           |                      |                        |

# Next, the Report Filter Screen is displayed. This will help you narrow the scope of your report.



## Report Filter Values

### Disease Management

|                         |         |                      |                          |                      |
|-------------------------|---------|----------------------|--------------------------|----------------------|
| Initial CD4 Date        | Between | <input type="text"/> | &                        | <input type="text"/> |
| Final CD4 Date          | Between | <input type="text"/> | &                        | <input type="text"/> |
| Initial Viral Load Date | Between | <input type="text"/> | &                        | <input type="text"/> |
| Final Viral Load Date   | Between | <input type="text"/> | &                        | <input type="text"/> |
| Display                 | 1000    | results              | <input type="checkbox"/> | Display print format |

**Report >** **Export**

- 1 Enter CD4 initial and final testing dates.
- 2 Click Report

# *Disease Management Report Filters*

- Use the date filters to specify a time span. From the drop-down list, select *Between*.
- Enter the dates you wish to filter by in the text fields using the format MM/DD/YYYY. E.g., for January 23, 2010, enter 1/23/2010. You can also click the calendar icon to use the pop-up calendar.
- Enter the beginning date in the first text field and the ending date in the second text field. Your report results will include all clients who received testing from 12:00 AM on the first date to 11:59 PM on the second date. For example, entering 6/23/2010 in the first text field and 6/27/2010 in the second text field and clicking *Search* will display all clients who received testing from June 23, 2010 through June 27, 2010.

# *Disease Management* Report Filters

- Most likely, you will enter the same time spans for both CD4 and Viral Load testing.
- When you have finished entering your filter parameters, click the Report button to display your report.

**Tip:** If you know you have entered the correct parameters and would like to export the data from this point without displaying your report, click the ***Export*** button.

# *Disease Management Report*

- The Disease Management Report results display a table sorted by the Extended URN value. From left to right, the table lists the client's Gender, the client's HRSA Race, the staff person assigned to them, their CD4 count from the first time span, their count from the second time span, and the percentage difference between the two values. Each value of the CD4 tests has an associated date of the test.
- At the bottom of the table, the number of records and the time and date of the report display. Beneath that are the filter parameters specified in the previous screen.



# Sample Disease Management Report

## Disease Management

| urnExtended     | gender | Race, with Hispanic  | Staff                           | CD4 Init | CD4 Init Date | CD4 Final | CD4 Final Date | CD4 Change     | Viral Init | Viral Init Date | Viral Final | Viral Final Date | Viral Change   |
|-----------------|--------|----------------------|---------------------------------|----------|---------------|-----------|----------------|----------------|------------|-----------------|-------------|------------------|----------------|
| WLTE1007591FSO  | Male   | White (not Hispanic) | <a href="#">Amaro, Karen</a>    | 366      | 5/3/2011      | 329       | 9/1/2011       | decreased > 5% | 2902       | 5/4/2011        | 20          | 9/1/2011         | decreased > 5% |
| JRWP0819762SCA  | Female | White (not Hispanic) | <a href="#">Smith, Maria</a>    | 484      | 5/6/2011      | 491       | 11/4/2011      | same +/- 5%    | 710        | 5/6/2011        | 6360        | 11/4/2011        | increased > 5% |
| DROKE09217029TT | Female | White (not Hispanic) | <a href="#">Watson, Dominic</a> | 712      | 1/25/2011     | 573       | 10/20/2011     | decreased > 5% | 48         | 1/25/2011       | 20          | 10/20/2011       | decreased > 5% |
| PTSA0222585999  | Male   | White (not Hispanic) | <a href="#">Amaro, Karen</a>    | 433      | 5/13/2011     | 446       | 11/10/2011     | same +/- 5%    | 48         | 5/13/2011       | 20          | 11/10/2011       | decreased > 5% |

1000 records, generated 3/26/2012 3:56:58 PM

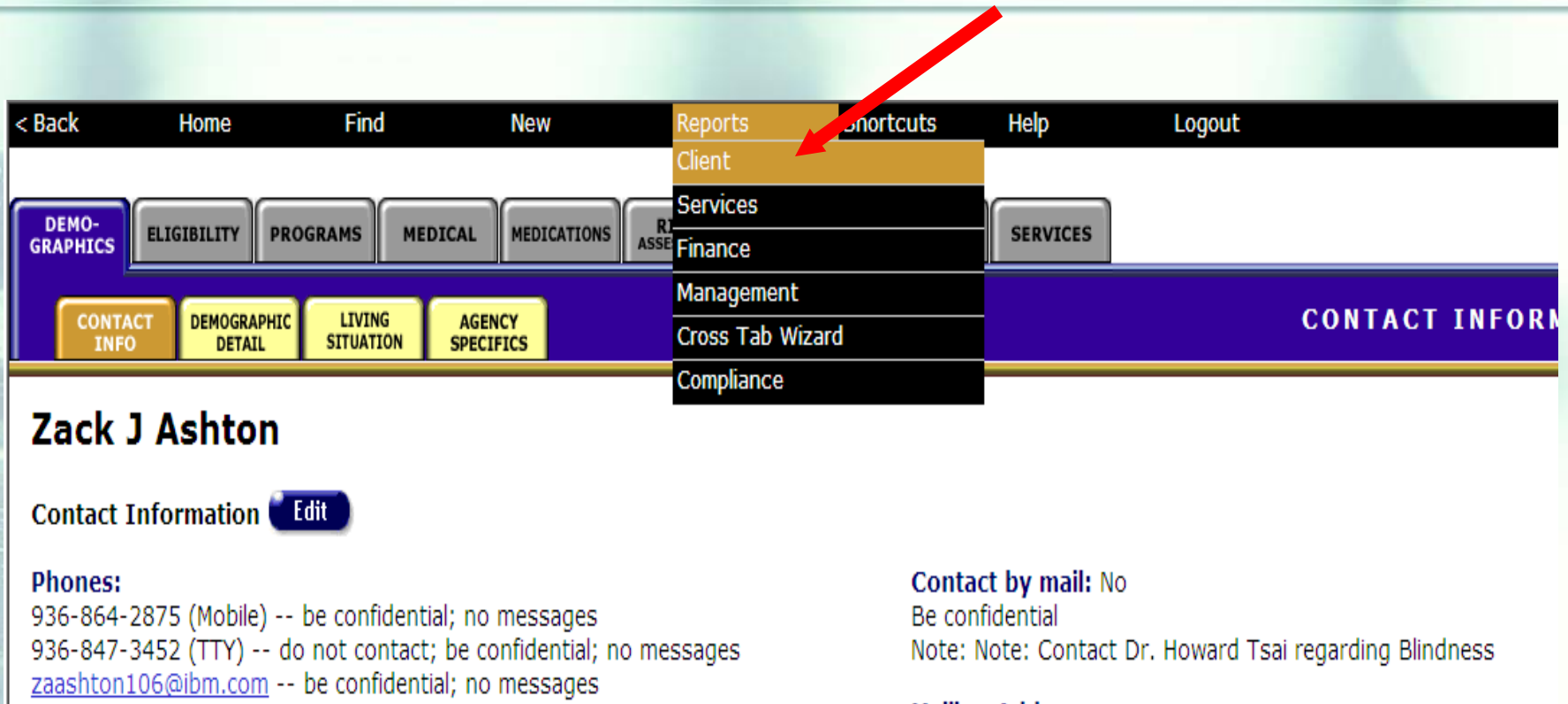
Criteria: Filter 1 BETWEEN '1/1/2011 12:00:00 AM' AND '12/31/2011 12:00:00 AM' AND Filter 2 BETWEEN '1/1/2011 12:00:00 AM' AND '12/31/2011 12:00:00 AM' AND

Filter 3 BETWEEN '1/1/2011 12:00:00 AM' AND '12/31/2011 12:00:00 AM' AND Filter 4 BETWEEN '1/1/2011 12:00:00 AM' AND '12/31/2011 12:00:00 AM'

# Running the *Fix-It Report*

- Some of your records need attention. We have designed a report that will help you find records in your agency that need CD4 Counts corrected and/or updated.

To locate the *Fix-It: CD4* report, go to *Reports* and select the *Client* menu.



The screenshot shows a web application interface. At the top, there is a navigation bar with links: < Back, Home, Find, New, Reports, Shortcuts, Help, and Logout. The 'Reports' link is highlighted, and a dropdown menu is open, showing options: Client, Services, Finance, Management, Cross Tab Wizard, and Compliance. A red arrow points to the 'Client' option. Below the navigation bar, there are several buttons: DEMO-GRAPHICS, ELIGIBILITY, PROGRAMS, MEDICAL, MEDICATIONS, R ASSE, and SERVICES. Below these are four yellow buttons: CONTACT INFO, DEMOGRAPHIC DETAIL, LIVING SITUATION, and AGENCY SPECIFICS. To the right, there is a purple bar with the text 'CONTACT INFORM'. Below the navigation bar, the profile for 'Zack J Ashton' is displayed. Under 'Contact Information', there is an 'Edit' button. The 'Phones:' section lists three numbers: 936-864-2875 (Mobile) -- be confidential; no messages; 936-847-3452 (TTY) -- do not contact; be confidential; no messages; and [zaashton106@ibm.com](mailto:zaashton106@ibm.com) -- be confidential; no messages. The 'Contact by mail:' section shows 'No' and 'Be confidential', with a note: 'Note: Note: Contact Dr. Howard Tsai regarding Blindness'. There are three dots below the note.

# The *Fix-It: CD4* report is located toward the bottom of the *Client Report* page.

[Clients on ART Medications](#)

The date range filter selects clients who had a service within the period. For the End Date filter, select "Is Null" -- this means the report only counts the client if the client is still taking the drug. To count clients if they have EVER taken the drug, leave the End Date filter blank.

[Fix-It: Proof of Income and Residency](#)

Lists clients served within a date range and whether there are Proof of Income and Proof of Residency Eligibility Documents at ANY agency not more than 6 months old. Expiration based on TODAY's date, not end date of reporting period.

[Client Name and Primary Staff](#)

Lists clients in alphabetical order with the client's primary staff person. For Display Order filter, select "=" from the dropdown, then enter "1" in the first criteria field.

[Fix-It: CD4](#)

Lists clients served within a date range and any problems with CD4 tests

Once you click on the report link, the *Report Filter Value* page will be displayed.

< Back   Home   Find   New   Reports   Shortcuts   Help   Logout

DEMO   DEMO   DEMO   DEMO   DEMO   DEMO

### Report Filter Values

Fix-It: CD4

Service Line Item Service Date   Between   3/1/2011   &   2/28/2012

Display   1000   results    Display print format

**Report >**   **Export**

**1** Type in the date range.

**2** Click Report.

[Contact Information](#)

# Running the *Fix-It Report*

- What will appear is a report showing all records for clients served by your agency during the specified date range.
- Error messages will indicate which records need attention and why.
- The report will look something like this...

# Sample *Fix-It* CD4 report

|             |             |             |             |             |             |             |             |
|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| < Back      | Home        | Find        | New         | Reports     | Shortcuts   | Help        | Logout      |
| <b>DEMO</b> | <b>DEMO</b> | <b>DEMO</b> | <b>DEMO</b> | <b>DEMO</b> | <b>DEMO</b> | <b>DEMO</b> | <b>DEMO</b> |

## Fix-It: CD4

| ARIES ID  | Client             | R/A   | CDC Disease Stage                   | OAMC/MCWP | Errors  |
|-----------|--------------------|-------|-------------------------------------|-----------|---|
| 100041656 | Ramirez, Andrea    | false | HIV positive, disease stage unknown | Yes       | QM WARNING - Only 1 CD4 Test in Last Year, Lowest CD4 (189) Indicates AIDS, |
| 100008291 | Smith, Joseph X    | false | HIV positive, disease stage unknown | Yes       | QM WARNING - Only 1 CD4 Test in Last Year, Lowest CD4 (1) Indicates AIDS,   |
| 100005776 | Ashton, Nancy J    | false | CDC-Defined AIDS                    | Yes       | QM WARNING - Only 1 CD4 Test in Last Year,                                  |
| 100016898 | 9000, Hal J        | false | CDC-Defined AIDS                    | Yes       | QM WARNING - Only 1 CD4 Test in Last Year,                                  |
| 100015775 | Smith, Cathy N     | false | HIV positive, symptomatic, not AIDS | Yes       | QM WARNING - CD4 Tests less than 90 Days Apart,                             |
| 100045277 | Osmond, Marie      | false | HIV positive, asymptomatic          | Yes       | No CD4 Test,  |
| 100015775 | Smith, Cathy N     | false | HIV positive, symptomatic, not AIDS | Yes       | QM WARNING - CD4 Tests less than 90 Days Apart,                             |
| 100045277 | Osmond, Marie      | false | HIV positive, asymptomatic          | Yes       |   |
| 100045285 | Puente, Jackie A   | false | HIV positive, asymptomatic          | Yes       |   |
| 100013341 | DeLaCerde, Aaron F | false | HIV positive, disease stage unknown | No        | No CD4 Test in Last Year, Lowest CD4 (100) Indicates AIDS,                  |
| 100006287 | Metcalfe, Darla K  | false | CDC-Defined AIDS                    | No        | No CD4 Test in Last Year,   |
| 100045434 | Jeffery, Monique   | true  |                                     | No        |   |

**12 records, generated 3/23/2012 1:01:33 PM**

*Criteria: Service Line Item Service Date BETWEEN '3/1/2011' AND '2/29/2012'*

[Export](#)

# Running the *Fix-It Report*

|  |   |
|--|---|
| No CD4 Test                                    | No CD4 Tests have ever been entered for the client.   |
| No CD4 Test in Last Year                       | Most recent CD4 Test Date is more than 365 days from <u>run date</u> of report.   |
| Lowest CD4 (xxx) Indicates AIDS                | Lowest CD4 Count is less than 200 and CDC Disease Stage is not "CDC-Defined AIDS" or "Disabling AIDS".<br>Note: the number in parentheses indicates the lowest CD4 count. |
| QM WARNING - Only 1 CD4 Test in Last Year      | Only one CD4 Test was found in the 365 days prior to the <u>run date</u> of the report.   |
| QM WARNING - CD4 Tests less than 90 Days Apart | Multiple CD4 Tests exist in the 365 days prior to the <u>run date</u> of the report, but the oldest and newest were less than 90 days apart.                              |



# Running the Fix-It Report

- Please look up the clients with error messages using their ARIES ID.
- Resolve the error by looking in client's charts and/or assessments for the missing or inaccurate information.
- To resolve errors that indicate the CDC Disease stage needs to be edited, go to the Medical History subtab (under the Medical major tab) to make the appropriate change.
- Then update ARIES accordingly.

# Questions & Answers

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- Do you have any questions?
- **Additional Resources:**
  - This presentation is posted in the Training section of [www.projectaries.org](http://www.projectaries.org).
  - The **ARIES User Manual** can be accessed by pressing the F1 button while in ARIES.
  - The ARIES Help Desk can be reached at **866-411-ARIES (2743)**.

# Thank you!

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- Thank for participating! We hope that this has been a productive use of your time.
- Together we can improve ARIES data quality!